

# FI\$Cal Acquisition Methods

Acquisition Method Value	FI\$Cal Acquisition Method	BidSync Acquisition Method	Description	Explanation of Change
001	Architectural and Engineering - COMPETITIVE	Statement of Qualifications	The State's process for selecting the professional services of private architectural, landscape architectural, engineering, environmental, land surveying, or construction management firms on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required at a fair and reasonable price. See State Contracting Manual Volume I, Chapter 11.	Changed to accurately reflect acquisition method as specified in the SCM and to allow enforcement of dollar thresholds in the system.
002	Fair and Reasonable - COMPETITIVE	Fair and Reasonable	Acquisitions under \$5,000 that are awarded based on one of five techniques (see the SCM for list techniques) used to determine whether or not a supplier's price can be determined to be fair and reasonable.	No Change.
003	Formal - COMPETITIVE	Formal Competitive	IT=Acquisitions above \$1mil; Non-IT goods=Acquisitions above \$100k; Non-IT services=Acquisitions above \$4,999. This acquisition method utilizes a "Formal" solicitation document such as an RFP or IFB. These acquisitions are typically advertised in	No Change.

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			the CSCR to solicit bids from the open market.	
004	Informal - COMPETITIVE	Informal Competitive	IT=Acquisitions below \$1mil; Non-IT goods=Acquisitions below \$100k; Non-IT services=Acquisitions below \$4,999. This acquisition method utilizes an "Informal" solicitation document such an RFQ and in some instances allows for phone quotes. Depending on the acquisition type and dollar value (see SCM), these acquisitions may be advertised in the CSCR to solicit bids from the open market.	No Change.
005	SB Option - COMPETITIVE	SB/DVBE Option	A competitive acquisition allowed per GC 14838.5. It can be used for acquisitions between \$5,000 and \$249,999.99. Contract award is based on competition between CA Certified Small Businesses where at least two (2) offers were RECEIVED/OBTAINED.	SB/DVBE Option was separated into SB Option and DVBE Option. The law allows contracting with EITHER SBs or DVBEs under this acquisition method and separating the title offers an accurate identification of the acquisition.
006	DVBE Option - COMPETITIVE	SB/DVBE Option	A competitive acquisition allowed per GC 14838.5. It can be used for acquisitions between \$5,000 and \$249,999.99. Contract award is based on competition between CA Certified Disabled Veteran Businesses where at least two (2) offers were	SB/DVBE Option was separated into SB Option and DVBE Option. The law allows contracting with EITHER SBs or DVBEs under this acquisition method and separating the title offers an accurate identification

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			RECEIVED/OBTAINED.	of the acquisition.
007	Public Works - COMPETITIVE	Formal Competitive	An agreement for the erection, construction, alteration, repair, or improvement of any public structure, building, road, or other public improvement of any kind. See State Contracting Manual Volume I, Chapter 10	Changed to accurately reflect acquisition method as specified in the SCM and to allow enforcement of dollar thresholds in the system.
008	Public Works - SB Option - COMPETITIVE	SB/DVBE Option	See above and State Contracting Manual Volume I, Chapter 10	SB/DVBE Option was separated into SB Option and DVBE Option. The law allows contracting with EITHER SBs or DVBEs under this acquisition method and separating the title offers an accurate identification of the acquisition.
009	Public Works - DVBE Option - COMPETITIVE	SB/DVBE Option	See above and State Contracting Manual Volume I, Chapter 10	SB/DVBE Option was separated into SB Option and DVBE Option. The law allows contracting with EITHER SBs or DVBEs under this acquisition method and separating the title offers an accurate identification of the acquisition.
010	Other - Special Statute (Buyer must indicate the law) - COMPETITIVE	Services are specifically exempt by statute	To be used when a state agency has a category of contracts that are exempt from DGS oversight but still require competitive bidding and may be subject to other laws governing contracting.	This acquisition method will allow transactions not subject to DGS oversight to be processed in the system without enforcement of dollar thresholds.

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011	NON-COMPETITIVELY BID (NCB)	NCB: Sub- Method: Only goods and services that meet needs of the State; Special Category Request (SCR)	Non-competitively bid contracts as a result of an approved NCB Justification or Special Category Request (SCR). These are non- competitive transactions adhering to a specific approval process in which only a single supplier is afforded the opportunity to offer the state a price for the specified goods or services.	No Change.
012	Community Based Rehabilitation Program (CRP) - NON- COMPETITIVELY BID	CRP	Non-competitively bid contracts that meet the criteria established by Welfare and Institutions Code Section 19404. An NCB Justification is NOT required.	No Change.

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013	Emergency - Public Contract Code - NON-COMPETITIVELY BID	Emergency Purchase; NCB: Sub- Method: Emergency acquisition for the protection of the public	Non-competitively bid contracts that meet the criteria established by Public Contract Code 1102, 10340, 10302, 12102, 12102.1. An NCB Justification is NOT required. Dollar thresholds are not enforced.	No Change.
014	Emergency - Non-Natural Disaster (Form 42) - NON-COMPETITIVELY BID	NCB: Sub-Method: Other; Emergency Purchase;	Non-competitively bid contracts that meet SCM criteria and that are subject to purchasing authority dollar thresholds. Example: A pipe breaks in the restroom and causes flooding. A plumber needs to be called to address the issue.	No Change.
015	Exempt by Law - Community Based Rehabilitation Program - Non-Competitively Bid	Do not use this code; it is a duplicate.		
016	Exempt by Law - Interagency Agreement - NON-COMPETITIVELY BID	State Programs: Sub-Method: Interagency Agreement	Agreements between California state agencies, agreements with a California State University campus, in some instances agreements with a University of California campus or Regents (UC) that adhere to SCM requirements. Terms and conditions for IAAs are used and subcontracting is not used to circumvent state contracting laws/policy. An NCB Justification is NOT required. Example:	No Change.

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			State agency "A" provides accounting and budgeting services to state agency "B" and "B" pays "A" for the service.	
017	Exempt by Law - Interagency Agreement - CA Dept. of Tech - NON-COMPETITIVELY BID	State Programs: Sub-Method: Interagency Agreement	State agencies are required to purchase certain services from the California Department of Technology (CDT). Although CDT has the authority to direct bill state agencies, some state agencies utilize an IAA when contracting for these services. When an IAA is used, it may be subject to DGS/PD oversight per PCC12100. If so, state agencies may enter into these contracts with CDT under DGS/PD delegated purchasing authority with an UNLIMITED purchasing authority dollar threshold.	There is a need to separate IT IAAs from IT IAAs where the CDT is the contractor. This is due to the enforcement of dollar thresholds for IT IAAs with entities other than the CDT. An example of an IT IAA with the CDT that may be executed without enforcement of dollar thresholds would be data center services provided by the CDT to another state agency.
018	Exempt by Law - Interagency Agreement - Office of State Publishing - NON-COMPETITIVELY BID	State Programs: Sub-Method: Office of State Printing (OSP)	State agencies are required to purchase printing services from OSP prior to contracting with suppliers.	No Change.
019	Exempt by Law - Interagency Agreement - Prison Industry Authority (PIA) - NON-COMPETITIVELY BID	State Programs: Sub-Method: Prison Industry Authority (PIA)	State agencies are required to purchase goods and services offered by PIA. PIA acquisitions for goods are conducted under DGS/PD purchasing authority.	No Change.
020	Exempt by Law - Interagency Agreement - Surplus Property -	State Programs: Sub-Method:	State agencies are required to acquire surplus property from	No Change.

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	NON-COMPETITIVELY BID	Surplus	the DGS Surplus Property before contracting with suppliers.	
021	Exempt by Law - Legal Services - NON-COMPETITIVELY BID	NCB: Sub-Method: Legal defense advice or services by an attorney or staff)	Contracts for legal defense, legal advice, or legal services by an attorney or the attorney's staff. See State Contracting Manual Volume I, Sections 3.07 and 5.80A.7.	No Change.
022	Exempt by Law - Other (buyer must indicate law) - NON-COMPETITIVELY BID	NCB: Sub-Method: Services are specifically exempt by statute NCB: Sub-Method: Contract with other government agency	The purchase of goods or services based on a law that <u>exempts these transactions from competition</u> . Although exempt from competition, these transactions are not exempt from DGS oversight. Example would include contracts with other public entities such as another state, local, or Federal agency pursuant to PCC10335(a) & PCC10340(b)(3)	No Change.
023	Exempt by Policy - Convention and Conference Facility Contracts - NON-COMPETITIVELY BID	NCB: Sub-Method: Other	Services for conventions and conference facilities, including room rentals, do not have to be competitively bid if under \$250,000. See State Contracting Manual Volume I, Section 3.20.	Changed to accurately reflect acquisition method as specified in the SCM and to allow enforcement of dollar thresholds in the system.
024	Exempt by Policy - Proprietary Maintenance - NON-COMPETITIVELY BID	NCB: Sub-Method: A single firm services a geographic	Proprietary maintenance services meeting criteria noted in the SCM may be executed without an NCB Justification up to the dollar thresholds identified in SCM	New Acquisition Method to allow for flexibility when assigning purchasing authority dollar thresholds.

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		region.	(currently \$250,000) and must not exceed purchasing authority dollar thresholds.	
025	Exempt by Policy - Proprietary - Software - NON-COMPETITIVELY BID	NCB: Sub-Method: Other	Proprietary software purchases meeting criteria noted in the SCM may be executed without an NCB Justification up to the dollar thresholds identified in SCM (currently \$250k) and must not exceed purchasing authority dollar thresholds. This acquisition may only be used with the IT Goods Acquisition Type.	New Acquisition Method to allow for flexibility when assigning purchasing authority dollar thresholds.



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026	Exempt by Policy - Proprietary - Subscriptions, Publications, Technical Manuals - NON-COMPETITIVELY BID	NCB: Sub-Method: Other	Proprietary subscriptions, proprietary publications, and/or technical manuals (manuals, law books, technical manuals, technical services related to publications, etc.) regardless of media format. May be executed without an NCB Justification up to the dollar thresholds identified in SCM (currently \$250k) and must not exceed purchasing authority dollar thresholds.	New Acquisition Method to allow for flexibility when assigning purchasing authority dollar thresholds.
027	Exempt by Policy - Subvention Contracts/Local Assistance - NON-COMPETITIVELY BID	NCB: Sub-Method: Subvention contracts with private/non-profit entity/agency	Agreements providing assistance to local governments and aid to the public directly or through an intermediary, such as a nonprofit corporation organized for that purpose. See State Contracting Manual Volume I, Sections 3.17 and 5.80B.2.b.	No Change.
028	Exempt by Policy - Other (buyer must indicate policy) - NON-COMPETITIVELY BID	NCB: Sub-Method: Other	SCM policy identifies certain goods/services that are <u>exempt from competition</u> .	No Change.
029	1122 Procurement Program (GSA Component) (requires offers)	<i>NOTE: This is a relatively new procurement program and therefore was not considered when BidSync was initiated.</i>	Written approval from CalOES must be obtained in advance prior to utilizing this method. This method uses Federal GSA Schedules directly and requires further competition utilizing a written solicitation	This is a relatively new procurement program and therefore was not considered when BidSync was initiated.

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			document.	
030	CMAS (requires offers)	CMAS	State policy requires soliciting best value offers from suppliers that have a valid CMAS agreement with the State of CA and must use the CMAS Terms and Conditions.	No Change.
031	Cooperative Agreements (requires offers)	WSCA/Coop	Individual User Instructions direct users on how to obtain best value offers in accordance with state policy requirements. State agencies may only contract with suppliers that have a valid agreement with the State of CA and must use the terms and conditions offered under those agreements.	Name change; WSCA no longer exists. Now NASPO Valuepoint
032	Cooperative Agreements (no further offers required)	WSCA/Coop	State agencies may issue "orders" against these Agreements in accordance with User Instructions. Purchasing authority dollar threshold is UNLIMITED for this acquisition method. The lead state competitively bid the contract in accordance with CA laws and included CA terms and conditions; the contract award was made to one supplier. Therefore, no further competition is necessary when state agencies use these	Name change; WSCA no longer exists. Now NASPO Valuepoint

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			contracts.	
033	IT Master Service Agreement (MSA) (requires offers)	Master Service Agreement	For use when executing contracts with an IT Consulting Services MSA contractor. State agencies must adhere to IT Consulting Services MSA User Instructions.	Although the IT Consulting Services MSA is an MSA, there was a need to create a separate acquisition method so that the PD is able to assign dollar thresholds that may vary from other MSAs.
034	Master Agreements (requires offers)	Master Service Agreement; Master Purchase/Price Agreement; Master Rental Agreement	Individual User Instructions direct users on how to obtain best value offers in accordance with state policy requirements. State agencies may only contract with suppliers that have a valid MA agreement with the State of CA and must use the terms and conditions offered under those agreements.	Consolidates several similar acquisition methods and eliminates outdated titles.
035	Master Agreements (no further offers required)	Master Service Agreement; Master Purchase/Price Agreement; Master Rental	State agencies may issue "orders" against these Master Agreements (MA) in accordance with User Instructions. Purchasing authority dollar threshold is UNLIMITED for this acquisition method. These MAs are based on an award to a single supplier, where further competition could not be achieved, or where the MA is mandatory.	No Change.

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		Agreement; Software License Program	Therefore, no further competition is necessary when state agencies use these contracts. Example(s): Credit Card Acceptance; Electronic Library Services does not require further competition since these MAs were created via the NCB process.	
036	Software Licensing Program (requires offers)	Software License Program	State policy requires obtaining best value offers. State agencies may only contract with suppliers that have a valid SLP agreement with the State of CA and must use the terms and conditions offered under those agreements.	No Change.
037	State Price Schedules (requires offers)	State Price Schedule	A list of suppliers is available.	No Change.
038	Capital Leases - LEASING	<i>State agencies conducting acquisitions under purchasing authority granted by the DGS/PD</i>		

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039	Operational Leases - LEASING	are not authorized to use these two methods at this time.		
040	Statewide Contracts (no further offers required)	Statewide Contracts	State agencies may issue "orders" against Statewide Contracts in accordance with User Instructions. Purchasing authority dollar threshold is UNLIMITED for this acquisition method. The Statewide Contract itself, was created as a result of a competitive bid process and awarded to specific suppliers for specified items. Therefore, no further competition is necessary when state agencies use these contracts.	No Change.